

USAID/GEO
GUYANA ECONOMIC OPPORTUNITIES

**RAPID RECONNAISSANCE SURVEY OF THE
EXPORT POTENTIAL OF GUYANESE PRODUCTS
IN CARIBBEAN MARKETS**

ANTIGUA

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ANTIGUA

BACKGROUND NOTES

Antigua is the largest island of the three-island Caribbean nation of Antigua and Barbuda (the third island being Redonda) and is located in the southern end of the Leeward Islands, approximately 402 km. southeast of Puerto Rico. Antigua has a total surface area of 279 sq. km., which is roughly 2.5 times the size of Washington, DC. The island has low rolling scrub-covered hills in the north, a fertile plain in the central region and tropical valleys and extinct volcanoes in the southeast. The island has many natural harbors and beaches (advertises as having 365 beaches, one for each day of the year). The highest peak is 402 m. high. The climate is tropical marine, with little seasonal temperature variation. The average annual temperature is 24° C. The island has an average annual rainfall of 42 in. but is very subject to drought and is currently in the third year of a prolonged drought.

The total permanent population is an estimated 66,970 (estimated for 2001). The population density is some 1,015 per sq. km. The population is mostly of African origin, with some Portuguese, British and Levantine Arab origin. English is the official language. The literacy rate is about 90%. Unemployment (estimated 2000) is around 8%.

Inquiries to the St. Lucia Demographic Service as to the portion of the population that are Guyanese immigrants resulted in no information. They do not keep such statistics. However, the Honorary Counsel, Mr. Joseph Gouveia, guesses that there are around 11,000 Guyanese in Antigua, which is a large number considering that there are only about 67,000 Antiguan. The Guyanese are scattered throughout the island and are well integrated in the trades and crafts, agriculture and professions of Antigua. Mr. Gouveia believes that a number of Guyanese produce fruits and vegetables for local sales and there are a large number engaged in the arts and crafts as well.

Antigua has one important seaport at Saint John and two paved airports. The international airport is located outside St. John. Both the seaport and airports are government owned and operated, as are the utilities.

ECONOMIC OUTLOOK

Antigua's economic situation has stagnated since Hurricane Georges curtailed a year of fairly strong growth in 1998. In mid-2001 the government announced a policy of greater

fiscal restraint due to the fiscal deficit of 12% of GDP in 2000. The economic outlook is expected to continue to be poor in 2002 due to the effect of the weak public sector.

Total GDP for 2000 was an estimated US\$ 691.9 million. The average GDP per capita for the same year was US\$ 9,690. The estimated economic growth for 2000 was 2.5% and inflation in the same year was estimated to be almost nil.

The most important sector of the economy is tourism. Antigua is heavily dependent on tourism. Some 82% of the GDP is generated by the service industry, which is mostly tourism-related. Complementary service industries such as financial services and information-based industries, including internet, have been developing along with tourism. The second most important source of GDP is industry (12.5% GDP) and agriculture trails a distant third at 4.6% of GDP.

The tourist industry has been interrupted by a series of violent hurricanes since 1995, which resulted in an estimated \$70 million in damage to the tourist infrastructure. Hurricane Georges forced nearly half of the island's hotels to close for repairs, resulting in a sharp reduction in visitor numbers for the year, over 2.7% over the previous year. In 1999, continued problems caused by hurricanes resulted in another 1.4% decline in visitors. While in the process of renovation, the tourism industry focused on improving Antigua's image as an upscale destination. As a result of re-openings of large hotel projects in 1999 and the new "look" for Antigua, total visitor arrivals rose sharply in 2000. Additionally, inaugural calls made by several cruise ship lines and the return of one to the larger cruise ships to full service after repairs in 1999 increased cruise ship calls by 31.4% in 2000. However, highly touted tourism projects to be made by the government have not materialized.

As for the rest of the Caribbean islands, two years of poor economic performance in the United States and Europe and the attack on the World Trade Center Towers in New York in late 2001 have negatively impacted the tourist trade in Antigua. These trends can be seen in Table 1.

Table 1. Numbers of tourists arriving in Antigua for the years 1999-2001.

		Stay-overs		
Year	Cruise ship	Air	Sea	Total Visitors
1999	328,038	207,862	23,852	559,752
2000	427,436	206,871	22,774	657,081
2001	408,812	193,176	Unknown	601,988+

Source: Information Office of the Statistics Department and the Tourist Bureau.

The total number of visitors for 2001 is unknown as the number of stay-over visitors arriving by sea has not yet been tabulated, but it is certainly greater than 602,000. Assuming that the number of stay-over visitors that come by sea (yachts, ferries, etc) to Antigua in 2001 declined (as did the number that came by cruise ship and air for the same

year), at least at the same rate as for the previous year (4.3%), then the total number of visitors in 2001 would have been around 623,000-624,000. Cruise ship visitors usually stay for the day, while air and sea visitors stay for more extended periods of time. An analysis of the length of stay of air arrival visitors for 2001 indicated that over 80.5% of those visitors stays over for 2-15 days. The same study indicated that 35% of visitors arriving by air were British, 31% were Americans, 8.5% were from other CARICOM/OECS nations and 6.6% were Canadians. As for the rest of the Caribbean tourist industry, the tourist season starts in October and ends in April, with the peak in March and April (2001).

The average daily spending in hotels and rental properties alone by stay-over visitors in Antigua was calculated in 1999 to be around 735,153 EC\$ (roughly US\$ 272,278 @ EC\$ 2.70). In 2000, total tourism receipts were US\$269 million.

Agriculture has fallen from an important sector of the economy, contributing some 40% of GDP thirty years ago to a position as a minor contributor to the Antiguan economy, contributing less than 12% of GDP. Although the population of Antigua has doubled over this period, the number of farmers has dropped from 8,000 to 2,000. When the sugar industry suddenly collapsed, it left 60% of Antigua's 66,000 acres in the hands of the government. The government's management policy of these lands has been to sell land for tourist and residential development and lease agricultural land for farming.

The major agricultural products are sea cotton, fruits, vegetables, coconuts, bananas, cucumbers, mangoes, sugarcane and some livestock. The Ministry of Agriculture has been trying to diversify crop production with a goal of self-sufficiency in some foods. Antigua depends heavily on imports of foods, over 25% of imports are foods, much of which is imported from the United States, Europe, other CARICOM and OECS nations (Dominica, for fresh produce). Efforts to increase activity in agriculture, particularly in exportable produce, have become more urgent as the decline of the tourist industry in the last three years has underscored the weakness of an economy heavily dependent on any one sector.

Only 18% of the landmass is arable, 11% is forested and 9% is pastureland. Natural disasters, restricted access to water for irrigation and little irrigation infrastructure are obstacles to sustainable cost-effective agricultural production, however.

Exports in 2000 were US\$ 39.8 million and imports were US\$ 375 million.

THE DISTRIBUTION CHANNELS FOR FRUITS AND VEGETABLES, FISH AND SEAFOOD AND RED MEATS

DOMESTIC PRODUCTION

Of all of the OECS countries, Antigua has the least portion of its population dependent on or involved in agriculture. Less than 4% of the GDP is generated through agricultural

activities and agriculture employs only 11% of the workforce (as compared to services – 82%). Major agricultural crops are sea cotton, mangoes, cucumbers, sugarcane, bananas and coconuts.

Fruits and Vegetables

The importance of agriculture has declined in Antigua over the last thirty years. This is reflected clearly by the condition of the government agricultural facilities. Because agriculture offers the lowest pay of the economy, it is not an attractive occupation on an island where tourism and financial services offer much more remunerative salaries.

Water, which is scarce and costly, and arable land, which has high alternate use value, are the limiting factors for most agricultural activities, particularly livestock and horticultural production. Drought studies have identified most of the island as being in moderate to very high risk of drought. The central area of the island is at lower risk for a drought but land deemed good for agricultural purposes is concentrated around watersheds.

Livestock

Livestock grazing is mostly informal and the presence of the tropical Bont tick, *Ablyomma variegatum*, (TBT) is a limiting factor to building up herds of cattle and small livestock. The tick arrived in Antigua over one hundred years ago and is now well-entrenched. Poor livestock management and free range grazing have helped to protect the tick from eradication efforts. Antigua is the one island of the ten with the TBT infestation that has reported the outbreak of heartwater disease, a fatal disease of domestic animals. Heartwater disease is caused by *Cowdria ruminantium*, a micro-organism, which is spread by the TBT. TBT is also associated with an irritating, debilitating and potentially fatal skin condition, bacterial dermatophilosis.

Fish and Seafood

The size and nature of the local fishing community and the types of fish that it takes and the seasons is unknown. When contacted, the Fisheries Division of the Ministry of Agriculture, Lands and Forestry refused categorically to discuss anything about the fisheries industry in Antigua. The Fisheries Officer also refused to discuss the presence of Guyanese fish in the market. He referred me to the Permanent Secretary, who was unavailable for comment.

THE WHOLESALE SECTOR

Fresh Fruits and Vegetables

There are three sources of fresh fruits and vegetables in Antigua: local production and imports from the region and the US. Apparently, Guyanese immigrants are involved in the local production of f&v and sell their products in the open-air and public markets.

I visited the new public market in St. John, near the Central Marketing Board. The market is conveniently located across the street from the bus station and the public fish market, which are located alongside the harbor shore. Public markets tend to have lower prices and a wider selection than the supermarkets and meet the needs and tastes of the rural consumer's budget. The St. John public market has a large area for fresh f&v vendors, which is under cover. The market is clean, organized and tidy. Vendors appear to attempt to display their products in as attractive a manner as possible. There are vendors selling out of trucks along the sidewalk and back of the market; however, the ambiance was generally one of order. There is a wide selection of products to be found in the market and includes many of the products being exported by Guyana, including bora and karella. Many of the products appeared to be fresh and of good quality, although the visit was made in late morning.

The Central Marketing Corporation, a governmental entity, wholesales and retails out of its facilities next to the new public market. The retail area is across the hallway from the agricultural supplies (agrochemicals). The retail green grocer area is small and crowded with product, mostly staple supplies. The Central Marketing Authority controlled the importation and distribution of food up until 2001. The Price Board, which controls retail prices, uses the CIF price and adds a mark-up depending on the category of the item.

Major wholesalers that import fresh produce are Trans Caribbean Marketing Corp and Island Provisioners. Trans Caribbean Marketing Corporation, whose Managing Director is Ed Meyer, mostly supplies cruise ships, hotels, restaurants, supermarkets and other retailers. Island Provisioners, managed by Ed Sharp, is capable of handling only partial container-loads of products. This would require consolidating shipments to fill containers.

Fish and Seafood and Red Meat

There is a very small public fish market in St. John at Market Point next to the Fisheries Market, Public Fruit and Vegetable market and Bus Depot. This market, on a Friday afternoon, had few vendors in the limited number of stalls, who were offering a limited range of products.

Island Provision and Trans-Caribbean Marketing tend to focus more on frozen and fresh products. A. S. Brydens recently installed cold rooms (Mr. Gouveia, unconfirmed) and might be looking for frozen meats. In addition, many of the larger supermarkets are also wholesalers to the smaller supermarkets, hotels and restaurants.

Processed Products

Much of the wholesale food distribution is through agent-distributors, who import the products from the manufacturer and wholesale the product to the smaller wholesalers, supermarkets, hotel, restaurants, grocers and counter shops. On Antigua, smaller

wholesalers feel that they are being squeezed by the larger importer/distributors as the price control board is giving preferential treatment to the larger competitors.

The largest wholesalers also act as manufacturer's agents of dry goods and branded products on Antigua and these include A. S. Brydens, Anjo, Dew's, Hutchinson and Goodwill Agencies.

THE RETAIL SECTOR

Like all of the CARICOM nations, there is a large movement of foodstuffs through counter shops (mostly dry goods and staple products such as potatoes, onions and garlic) and public markets. Antigua has a number of supermarkets which are generally small and offer a limited range of dry goods such as rice and flour, frozen vegetables and meats, canned and bottled juices and sodas, dairy products and limited number of fresh fruits and vegetables.

The largest supermarkets chains on Antigua are the Epicurean (currently 2 outlets but a third is under construction), Bargain Center (2 outlets) and Food City (2 outlets). Food City and the Epicurean also import foods and act as wholesalers to smaller retailers.

However, the emergence of the new supermarket, The Epicurean, has raised standards for the sector, offering both a wider range of brands for standard grocery items as well as a wide range of specialty and gourmet products in a clean, air-conditioned, modern store with scanners. The Epicurean, owned and operated by French Canadian, John Boulier; has three stores. Two are currently in operation, one at the Wood Hall and the other on Jolly Harbor. The third, a second store in Jolly Harbor, is under construction. The store at Wood Hall is the anchor store for a mall located on Old Friar's Hill Road. That store is modern, clean, well-lit, well air-conditioned and large. It has 10-11 aisles, well-spaced, and a special section for "gourmet" items, which includes sauces, pickles, etc. In addition to retailing, the Epicurean has a catering service and wholesales high-end items to hotels.

Other larger supermarkets are now working hard to meet the new competition that The Epicurean represents. Food City at Harbor Point is large and has a low-budget appeal. The recently opened Bargain Center at Market Point in St. John is trying to be a low-budget alternative to the Epicurean. It is clean, well-lit and comfortable and well-stocked with low-priced products that should appeal to the budget-conscious buyer. The personnel are friendly and try to be helpful. However, perhaps because it just opened, the new Bargain Center still cannot meet the range or quality of products of the Epicurean and had a particularly limited meat section, one stand-alone freezer with chicken parts, lamb shank, goat and ground beef.

The 1997 CBATO Export Guide to the Consumer Food Market reported that at the time of the report, two of the large island distributors, Dew's and Hutchinson's, had exited the supermarket business. Since that report, Grants Supermarkets (also Caribbean Marketing Wholesaler) has also failed.

Other smaller supermarkets on Antigua include: Christos Supermarket (4 outlets), Food Brokerage Services, Ltd (3), Price Rite, Walt's Supermarket, Food Emporium and the Gourmet Basket. There are a number (hundreds) of small country stores/counter shops that handle dry goods as well.

Fresh Fruit and Vegetables

As for a number of islands in the region, Antigua receives a lot of produce from Dominica, some of which goes into the retail sector and some of which appears in the public markets. Antiguan producers also supply the retail supermarket and hotel and restaurant trade.

Some supermarkets reported that they relied upon a combination of locally grown produce, which they purchased directly from the producer and importer/wholesalers for products not grown locally or in short supply locally.

Red Meats

Red meats sold on the market include: pork, beef, lamb and goat. Black bellied sheep are grown on the island, as are goats. Free-range livestock is common in the countryside.

Supermarkets carry more red meats than fish, in general. Bargain Center offers both local and imported goat (US\$2.61/lb) and lamb. The Epicurean offers the widest range of cuts, but which, nevertheless, not a very wide selection. For example, for beef, ground beef, top round, round, chopped round, tenderized round, sirloin, t-bone and ribs were available. Prices ranged from US\$ 1.96/lb for ground beef to US\$ 8.94/lb for t-bone, for beef not specifically identified as imported or "export" quality.

Fish and Seafood

Mr. Gouveia related that some of the Guyanese processed and fish products are arriving in small lots with small, informal traders who bring it back with them on periodic shopping trips. Product comes by air with the traders.

The supermarkets offer some frozen fish items. Bargain Center at Market Point has a meager selection of fish. The best selection was found at the Harbor Rd. Food City. The large Wood Mall Epicurean carries some fish items. None of the supermarkets offered fish packed in packaging that identify the source of the fish. The packaging was generic, consisting of a plastic bag and price label of the supermarket. This is unusual as in other countries, there are usually a mix of locally caught fish, which are packaged in the manner described above, and professionally packed, branded fish. This suggests that the supermarkets are buying fish in bulk and packaging it themselves or receiving it from importer/distributors who are doing this.

Food City and The Epicurean both carry frozen bangamary and butterfish, fish common to Guyana. Bangamary and Butterfish can be found in their frozen fish selection. Bargain Center carried only one fish specie in its frozen meat section, which is very small, limited to one open freezer compartment, shared with chicken, ground beef, lamb and goat.

The only frozen fish that The Epicurean offered was bangamary, whole (US\$ 2.05/lb) and filleted (US\$ 3.08/lb). Food City offered bangamary and butterfish, filleted only, at the same price of \$2.61/lb. Food City's range of products included King fish steaks, grey snapper and grouper fillets at US\$ 4.10/lb.

Perhaps the largest demand for fish on Antigua comes from the restaurant and hotel trade during the tourist season, November through April. Fish appears on the menu of almost all dinner menus for restaurants (as opposed to the many small homemade food-style, pub-style and vegetarian restaurants. However, these usually include the fish species more favored by the US and European tourists: shrimp, crayfish, mahi mahi, etc. sourcing is through local fishermen (crayfish, for example) and wholesalers.

Processed Products

Of all the islands visited, the widest variety of processed products from Guyana appeared on the most supermarket shelves in Antigua than any other. Antiguan supermarkets offer a number of the Guyanese dry goods such as casareep, green seasoning, jellies and cake coloring. A survey of Food City, Bargain Center and The Epicurean in St. John resulted in finding all of these products in all three stores.

Table 2. Processed Products of Guyanese Origin Found in Selected Supermarkets in St. John, Antigua.

PRODUCT TYPE	PRODUCER	UNIT SIZE	SUPERMARKET	PRICE (US\$)
Casareep	Sari	300 ml	Food City	1.50
	Majors	284 ml	Bargain Center	1.40
	Majors		The Epicurean	Out of stock
Green seasoning	Saris	300 ml	The Epicurean	1.29
	Saris	300 ml	Bargain Centre	1.48
Cake coloring	Majors	10 oz	The Epicurean	1.60
Jelly	Tandy (pineapple and guava)	340 g	Bargain Centre	2.06

US\$ = 2.68 EC\$

Casareep was offered in all of the supermarkets, but in all cases, only one brand was offered. Prices ranged from US\$1.40 – US\$ 1.50 for 284-300 ml bottles.

No mango achar/amchar products were offered. The closest substitute was mango chutney from a wide variety of producers (all non-regional imports), but none were Guyanese in origin. Apparently this item is not in much demand in Antigua.

Green seasoning and hot sauces were the two product lines with the widest range of brands displayed in all of the supermarkets. Sari's green seasoning was available in all three supermarkets. Chief appeared in 2 supermarkets. Denise's was on the shelf at Food City only and was the most expensive of the three brands.

Hot sauce was the product line with the widest selection of brands in the supermarkets surveyed. The Epicurean had the widest selection of brands of hot sauces from many origins: Tabasco (USA), Tropical (Costa Rica), Crystal, Chief (Trinidad), Best, Louisiana (Canada), Susie's (Antigua), Judie's (Antigua) and Denise's (Antigua). Food City had many of these brands as did Bargain Center, but neither carried all of these brands. Of the three Antiguan brands, only Susie's is listed in the phonebook. Prices for hot sauces ranged from US\$ 2.15 – US\$ 3.87 for the 5 oz bottles. Tropical Pepper Co. and Susie's both had attractive, professional labeling. Judie's has an attractive label with a homemade look. Interestingly, Denise's, Susie's and Judie's, the three locally produced brands, were all more expensive than the Tropical Pepper Co. hot sauces (US\$ 2.32- 2.42 v. US\$ 2.15 for 5 oz bottle).

The selection of jellies, jams and preserves was large but dominated by brands imported from Canada, the United States and the UK. Regional brands included Mabel (Trinidad), Grace Kennedy (Jamaica), Matouk (Trinidad), Tandy (Guyana) and Judy's (Antigua). The most interesting regional brand as far as presentation is concerned was Judy's. The selection of Judy's was most broad in The Epicurean and included: Magical Mango Jam, Tropical Inferno (a hot pepper marmalade), Chutney Cheerful and Judy's Green (and Red) Pepper Jellies. Only Bargain Center offered the Tandy jellies, primarily the guava and pineapple flavors. Prices ranged from US\$ 1.88 (Grace Kennedy) to US\$ 2.60 (Matouk) for 340 g jars. The Tandy jellies fell in the low price range at US\$ 2.06 for 340 g jars at Bargain Centre, the low priced shopping alternative.

LUMBER AND WOOD PRODUCTS

The only information available on the import of sawn timber is from FAOSTAT. The last meaningful data (year after which annual figures simply repeat previous year's data) are reported in 1994. It should be mentioned here that the FAO rates the reliability and consistency of the data provided by Antigua and Barbuda at around 50%. Nevertheless, the data is included to give a relative idea of the level of demand for imports of wood products in the categories of roundwood, sawnwood and plywood panels. The total value and volume for these products for the years 1991 through 1994 are given in the table below. FAOSTAT provides data in cubic meters. Roundwood is converted to board feet using a conversion factor of 204.7. The volume for sawnwood and panels is converted

using a conversion factor of 423.7 and the conversion factor for panels from cubic meters to square feet is 0.295 cu.m. = 1,000 sq. ft.

Table 3. The Volume ('000 bdft) and Value ('000 US\$) of Total Imports of Selected Wood Products into Antigua & Barbuda Between the Years 1991 and 1994.

Product	1991		1992		1993		1994	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Roundwood	3,684	18	6,141	30	3,479	17	5,322	26
Sawnwood, T	4,025	1,722	5,281	2,094	4,095	2,157	4,567	3,044
Sawnwood, NC	254	1,544	361	1,952	87	2,066	187	2,906
Plywood	1,101	663	1,700	1,099	1,346	1,172	1,525	1,026

Source: FAOSTAT Forestry database, 2002. Abbreviations: T = total and NC = non-coniferous.

The demand for these products seems to fluctuate somewhat over the four-year period but was relatively stable. The roundwood and sawnwood products are in greatest demand. These products may be coniferous or non-coniferous products. The figures for non-coniferous sawn wood are an indication of the relative demand for the greenheart, purpleheart and other non-traditional tropical hardwoods in this category. In general, over this period the non-coniferous species sawnwoods are in very low demand relative to the coniferous sawnwoods, around 6% of demand in 1991 and 1992 but dropping in this category to 4% by 1994.

Mr. Joseph Gouveia, the Honorary Consul of Guyana on Antigua, indicated that he represents Bulkan Lumber of Guyana and confirmed that there are only 2-3 other private individuals on Antigua, who, like himself, represent a specific Guyanese lumberyard. Apparently, there had been some cases of builders who had sought out greenheart to finish jobs through unscrupulous Guyanese vendors and lost their deposits. This has not helped to increase the demand for greenheart from Guyana. Most orders come from contractors, are special orders and because of the number and size of the orders, several had to be consolidated to have sufficient volume to justify a shipment.

According to Mr. Gouveia, insurance companies (he mentioned Lloyds specifically) in Antigua are becoming more interested in insuring structures built with greenheart as they are finding that they hold up better in some natural disasters than do those made with concrete.

All of the large building materials and hardware retailers found in the Antigua and Barbuda phonebook were contacted to determine who carried greenheart and purpleheart in that sector. Only one building supply company had greenheart. However, they had very few pieces and sizes and the vendor was unable to provide a quote for those pieces. None of the outlets contacted carried purpleheart products.

Most of the newer buildings on Antigua are being constructed with cement blocks or pitch pine, only a very few older homes are made of greenheart. Results of general inquiries indicate that there is little demand for greenheart for home and office/shop

construction and that greenheart is hard to find and generally has to be purchased through special orders.

There is no data available for furniture products. Data for miscellaneous wood products for 1997 is available from CARICOM Secretariat and Toni Williams and is given in the table below. Given the data in the table, excluding: the cork, which is not grown in Guyana and probably over-valued at \$1,219/kg, the crossties, of which, apparently only one or two (@ 17-18 kg each) were imported in 1999 at the improbable value of US\$129-260 each and the non-coniferous wood chips/particles, of which only 22 kg were imported, valued at US\$5.96/kg (\$2,227/mt); the two categories with the greatest reported import value per metric ton were wood strips for parquet flooring and wood charcoal. These are also the two categories with the greatest quantity imported.

Table 4. Quantity and Value of Miscellaneous Wood Products Imported into Antigua & Barbuda in 1999 (EC\$2.68:US\$1).

COMMODITY DESCRIPTION	COUNTRY OF ORIGIN	QUANTITY IMPORTED (MT)	IMPORT VALUE (US\$)	IMPORT VALUE US\$/MT
Natural cork	US	0.077	939	12,192
Wood charcoal, including shell or nut charcoal	US	275	171,614	624
Non-coniferous wood in chips or particles	US	0.022	49	2,227
Saw dust and wood waste and scrap	US, Guyana	10.6	6,322	596
Wood of other non-coniferous sp., treated with paint, stain or creosote	US	52.3	35,085	670
Other railway or tramway sleepers (crossties)	Puerto Rico	0.035	260	7,428
Other wood, including strips and friezes for parquet flooring	Canada, Guyana, Puerto Rico, UK, US, Trinidad	196.5	244,142	1,242
Total		534	458,411	858

Source: CARICOM Secretariat-Guyana and Toni Williams, 2002

IMPORT REGULATIONS AND CUSTOM REQUIREMENTS

The ban on commercial shipments of produce from Guyana due to the hibiscus (or “pink”) mealy bug (*Maconellicoccus hirsutus*) has recently been lifted in Antigua. The ban continues to be in force for domestic luggage. Not all fruits are admissible, however, and the Ministry of Agriculture, Lands and Fisheries has developed a protocol that must be followed. This protocol is similar to the protocol developed for Barbados. The new protocol, “Terms and Conditions for the Resumption of Trade in Fresh Agricultural Produce with the Republic of Guyana, February, 2002”, contains the list of admissible

produce, the conditions that must be met by the growers, importers and exporters; and allowable pesticides.

Products not allowed entry are mostly fruits: mango, plantain, papaya, citrus. Most of these are not allowed as they are fruit fly hosts. Plantains are included as they are hosts for Moko disease and papaya to avoid the entrance of the papaya ringspot virus and certain aphid vectors of that disease. One vegetable not allowed in is the rough-skinned pumpkin (smooth skin pumpkins are allowed). For a list of permitted produce, one should probably contact the Plant Quarantine Inspection Service in Guyana.

The list of non-approved pesticides is adapted from May 1999 Supplement 2 “Quick Scan on Environment, Social and Health Issues for Fresh Fruit and Vegetables” developed by the CBI (www.cbi.nl).

The protocol requires the Ministries of Agriculture of both nations to maintain a list of the approved exporters, importers and packinghouses. The farms must be hibiscus mealy bug free. None of the preferred hosts of the insect may be grown on the farm or nearby: sorrel, hibiscus, soursop, okra, broomweed and sugar apple. Only produce from the farms inspected and certified as hibiscus mealy bug free will be allowed entry and the produce must received the approved post harvest treatment and packed in approved packaging materials in certified packinghouses. Exporters must maintain a list of the farms and product packed from those farms. A traceback system must be in place as well.

Before export, a Guyanese inspector must inspect the product and issue a phytosanitary certificate. Every six months a plant inspector from Antigua & Barbuda must visit Guyana for a minimum of 3-days to verify that the protocol is being implemented. The cost of the trip must be borne by the importer, exporter or both.

The procedure for importing fruits and vegetables is for the importer to first register with the Plant Protection Office at Dunbar General, applying with the “Registration Form for Intention to Import Fresh Produce” which may be obtained through the Plant Protection Office at Dunbar General.

Once registered, each shipment must be accompanied by an import permit, which is obtained by the importer filling out the import permit form, which is good for only one shipment and for a maximum of 60 days. Application for this form must be made through Mrs. Romalita Gore-Simon at Dunbar General (See Annex I for contact information). Guyana Marketing Corporation has a copy of this protocol and the list of admissible f&v.

Guyanese produce is already being imported into Antigua, presumably under the new protocol. When visiting Mrs. Gore-Simon, she showed me an import permit request from a Guyanese exporter of passion fruit that she had recently received and was processing.

In general, there seems to be a good deal of confusion as to what is permitted and with whom one should speak to make inquiries. There seems to be very little clear

communication within the government and with the public. A good example of this is the experience with the inquiry of the admissibility of red meats from Guyana.

Mr. Gouveia had indicated that despite the lifting of the ban on Guyanese animal products due to the presence of foot and mouth disease in Guyana, the Antiguan government had been slow in changing its policy towards imports from Guyana with the result the Antiguan Veterinary Service could not accept shipments until the status of the Guyanese meats were changed. Also, he also indicated that the Antiguan inspectors had wanted to visit and inspect Guyanese processing plants for red meats and that “they” had been trying to get them to accept a certificate issued by the Trinidad and Tobago inspector, with no success as of his last contact with the Antiguan inspection service.

However, in discussing these matters with the Chief Veterinary Officer of the Antigua Veterinary Service, Dr. Vikinyo said that to his knowledge there are no restrictions on the import of red meats or fish and seafood’s from Guyana on the basis of pest quarantine at the present time. Neither did he feel that it was necessary for an Antiguan inspector to come inspect and certify the Guyanese facilities. Dr. Vikinyo offered the observation that CARICOM should set the standards and make the quarantine decisions for the region. Dr. Vikinyo provided a copy of “The Antigua and Barbuda Animals (International Movement and Disease) Regulations of 1993”, which regulates the importation of live animals and animal products (including fish and seafood) into Antigua and Barbuda. In reviewing the act, the only restriction on the imports of animal carcasses from Guyana is the Rupununi area. Imports must be accompanied by a certificate of inspection issued by the inspection and certification agency of the country of export.

Dr. Vikinyo did indicate that, insofar as red meats, were concerned that he had become aware that the abattoirs in Guyana may not meet the human health requirements. However, to his knowledge, at the moment there are no restrictions on the import of these products.

Antigua and Barbados Bureau of Standards

The protocol “Terms and Conditions for the Resumption of Trade in Fresh Agricultural Produce with the Republic of Guyana, February, 2002” lays out the general quality requirements for fruits and vegetables. According to the Antigua and Barbuda Bureau of Standards (ABBS), no national standards for fresh fruits and vegetables currently exist (emitted by the ABBS office). The standards followed by Antiguan inspectors are those of the CODEX ALIMENTARIUS for meats and fresh produce and the new CARICOM standards for fruits and vegetables. The CODEX standards can be found at www.codexalimentarius.com. Mrs. Rodriguez, Director of the ABBS, was able to find only draft copies of the CARICOM standards for carrots, cassava, sweet potatoes and spices and sauces.

CUSTOMS DOCUMENTARY REQUIREMENTS

Two separate inquiries were made to the Comptroller's Office concerning taxes, duties and surcharges. Neither inquiry elicited a response from Mr. Brown, the Comptroller.

Information from other sources indicates that Antigua Customs require the following documents be presented with each shipment:

- Import permit, if needed
- CARICOM commercial invoice
- CARICOM certificate of origin
- Airway bill or Bill of lading
- Packing list
- Appropriate health/sanitary certificates

CHALLENGES, OPPORTUNITIES AND RECOMMENDATIONS

Fruits and Vegetables

The new protocol allowing certain Guyanese f&v into Antigua has only been in place since February of 2002 and there are some exporters who have recently applied for import licenses and, presumably, by now have made some shipments. At the time of the visit, it is too early to determine how successful the new protocol would be over time.

Mr. Gouveia indicated that many of the Guyanese in Antigua produce f&v. Some of those must wholesale and retail at the public markets. Exporters in Guyana should make contact with Guyanese immigrants in Antigua who are currently wholesaling or marketing f&v and provide product for the contact in Antigua to market.

Transportation and cost-return analysis is important to identify which products would arrive in Antigua in good condition, what price would justify shipment and whether there is interest in the wholesale, supermarket or HRI retail sectors for those products.

Fish and Seafood

Something is amiss when the Chief Fisheries Officer won't respond to public inquiries concerning fish from Guyana being imported into the country. He directed me to speak to the Permanent Secretary and since the Permanent Secretary was unavailable to respond to my inquiry at the time of this field trip, I would suggest that someone make that inquiry now.

Red Meats

Four possible challenges to the success of Guyanese red meat in Antigua:

- The food safety in processing question
- Competitiveness with US for expensive cuts and Argentina and Venezuela for cheap cuts of beef, UK for lamb
- Demand for pork and goat
- Transportation cost and Customs clearance cost

The open-ended comment of the Veterinary Officer regarding food safety in the processing of meat and fish in Guyana may indicate that this will become a future issue for Guyanese exports of meats to Antigua. More inquiries should be made into this issue and as soon as the new abattoir is certified, its certification should be presented to the Chief Veterinary Officer and all other interested parties.

Is marketing red meat from Guyana profitable? Is it competitive with the other red meats being exported to Antigua? Using the costs incurred by the trial shipment, the cost-return analysis should be made to determine the profitability of marketing meat to Antigua. Will beef from Guyana be competitive with that of Argentina and Venezuela for the cheaper cuts or competitive with the US for more expensive cuts? Is there sufficient demand for

goat or sheep and would the market for those meats be a more profitable and less competitive niche market in Antigua for Guyana.

Before the end of the field trip to Antigua, Mr. Gouveia had stated that he had negotiated a trial shipment of red meat from Guyana and that Trans-Caribbean Marketing (TCM) had agreed to receive the meat. The developments/results of that shipment should be given some follow-up to understand what problems the importer might have had with the importation of the shipment, including with transportation, packaging and customs clearance. Inquiries should be made to determine whether the buyers liked or disliked the product so as to determine whether any additional efforts should be made to develop the relationship with TCM and what positive attributes of the product might be used to promote it in the future.

Sauces, Seasonings and Preserves

Guyanese brands of these products are already commonly found in the major supermarkets throughout Antigua and they are competitively priced. Cassareep and green seasoning are unfamiliar to most tourists, who are unlikely to try them without more information (better labeling). Demand for these products comes primarily from the Guyanese immigrants, of which there is a small community. Other products probably have a wider appeal, jellies and jams for example, but there is considerable competition from other brands, including those that are locally produced or imported from the US, Canada or the UK.

Increasing demand for these products would probably require an investment in better labeling and bottling and some point of sales promotional materials to educate the shoppers as to what the products are, what they are made of and how they are used.

Lumber and Wood Products

One challenge to increased market penetration with wood products is a reportedly negative image of Guyanese traders that was created by Guyanese lumber traders having taken orders and advances from builders in Antigua and failing to make the shipments. Perhaps making available a list of Guyanese lumberyards with good quality products and who are known to be financially sound and to have good business practices would be a useful addition to a promotional package.

Antigua is a financial center and many very impressive buildings are being built to house off-shore banks, finance centers and financial consulting firms. There are a number of luxury resorts around the island. These and new businesses offer opportunities for exotic/luxury wood products both for their construction and furnishing.

The non-traditional as well as traditional tropical hardwoods should be strongly promoted to architects in Antigua. The architects have the contact and influence to promote unusual tropical woods successfully to their clients and the builders. Building contractors should also be the subject of these promotional efforts at the same time. Promotion for the two

groups would have a slightly different focus. Architects need to know the esthetic and structural properties of the wood. The builders will be more interested in the working characteristics of the woods and techniques that would work best with different woods. Promotional packages should be tailored to target the customer.

Efforts should be made to contact the Antigua and Barbuda Institute of Architects (contact information in Annex I) to arrange a promotional seminar with their members. The architects could be used as references for the builders. Architects tend to prefer to work with certain builders and constructors. A caution strategy would be to select a few architects and their builders who are interested in working with new materials and new wood products and assist them in successfully building structures that please their client. With a few well-publicized successful projects, more clients and more architects and builders will begin using the new woods.

ANNEX I

REPRESENTATIVE OF THE REPUBLIC OF GUYANA

Honorary Consul of Antigua and Barbuda

Mr. Joseph A. Gouveia
P.O. Box 2226
St. John, Antigua, WI
Telfax: 268-462-6552
Email: govees@candw.ag

GOVERNMENT AGENCIES

Plant Quarantine Service

Address: Cotton and Plant Protection Bldg, Old Friar's Hill Rd
Dunbars General, St. John's, Antigua
Contact: Mrs. Romalita Gore-Simon
Position: Plant Quarantine Officer
Tel: 268-562-1923, 462-0418
Fax: 268-462-4962 (another office)

Veterinary Service

Address: Olivers Livestock Station,
P.O. Box 1282, St. John's
Contact: Dr. Kanyuire Vikinyo
Position: Chief Veterinary Officer
Tel: 268-460-1759

Fisheries Division

Contact: Mr. James
Position: Chief Fisheries Officer
Tel: 268-462-1372/6106/1759

Antigua & Barbuda Bureau of Standards

Address: Box 1550, cnr. Redcliffe St. and Corn Alley,
Ministry of Trade Bldg, St. John, Antigua, WI
Contact: Diane Lalla-Rodriguez
Position: Director
Tel: 268-462-2424, 562-4011
Fax: 268-462-1625
Email: abbs@candw.ag

Ministry of Agriculture Marketing

Address: Ministry of Agriculture Bldg.,
cnr Temple & Nevis St, St. John's, Antigua
Contact: Kathleen Forde
Position: Project coordinator
Tel: 268-462-1007
Fax: 268-462-6104

Office of Tourism, Statistics Department

Address: Redcliffe St.
Contact: Julia Braithwait, Yvette Philips and Mr. Gardener
Position: Statistics
Tel: 268-463-9522

Customs Department

Address: Church & Thames St, St. John's, Antigua and Barbuda
Contact: Mr. Brown
Position: Comptroller of Customs
Tel: 268-462-0829
Fax: 268-462-2767

Central Marketing Corporation

Address: Kentish Rd, St. John's, Antigua
Contact: Mrs. Stephens
Position:
Tel: 268-462-1491, 2569, 2578
Fax: 268-562-3279, 462-4723

The Antigua and Barbuda Institute of Architects

Address: Fort Road, Box 2844, St. John's, Antigua
Tel: 562-2770
Fax: 562-2771

ANNEX II

RETAIL PRICES OF FRESH FRUITS AND VEGETABLES, FISH AND SEAFOOD AND SELECTED PROCESSED PRODUCTS

Table 1. Retail prices for Selected Fruits and Vegetables from Supermarkets in Antigua, September 2-6, 2002.

Prices in US\$/kg except where otherwise indicated.

Commodity	Food City Hrbr Pt	Bargain Centre Mkt Point	Epicurean	CMC Whlsle	Food Emporium	Avg	Min	Max
Long beans		3.30				3.30	3.30	3.30
Eggplant		0.87	3.71		2.88	2.49	0.87	3.71
Sweet corn (ear)	0.93		0.66	0.87		0.82	0.66	0.93
Cucumbers		0.77	2.88	2.27	2.88	2.20	0.77	2.88
Okra			3.71			3.71	3.71	3.71
Christophene					2.88	2.88	2.88	2.88
Pumpkin	3.30		3.09	2.47		2.95	2.47	3.30
Butternut squash		2.47	2.43			2.45	2.43	2.47
Eddoes	2.46		3.91	2.47	2.46	2.83	2.46	3.91
Dasheen		2.27			2.46	2.36	2.27	2.46
Sweet potatoes	2.46		2.43	2.27		2.39	2.27	2.46
Yams	3.30	2.88			3.30	3.16	2.88	3.30
Cassava	2.30	1.57	2.68	2.22	2.46	2.25	1.57	2.68
Plantains					3.30	3.30	3.30	3.30
Ginger root		4.00	4.33			4.16	4.00	4.33
Potatoes		0.82		0.80		0.81	0.80	0.82
Onions				1.40		1.40	1.40	1.40
Watermelon			1.85	2.06		1.96	1.85	2.06
Papaya (each)			10.30			10.30	10.30	10.30
Limes	3.30	3.30	3.91	3.30		3.45	3.30	3.91
Avocados (each)		4.94	3.71	3.30		3.98	3.30	4.94
Pineapple			4.33	3.13		3.73	3.13	4.33
Coconut (each)			1.24	1.65		1.44	1.24	1.65

Exchange rate: EC\$ 2.67 = US\$1.

Table 2. Retail prices (US\$/kg) for Fish and Seafood in Supermarkets in Antigua, September 2-6, 2002.

Fish	Product	Harbor Pt Food City	Epicurean
Bangamary	fillet	5.70	4.48
	whole		6.72
Butterfish	fillet	5.70	
Flying fish			
Grey snapper	fillet	8.95	
Grouper		8.95	
King fish	steak	8.95	
Shrimp	jumbo	36.67	

Exchange rate: EC\$ 2.67 = US\$ 1.00.

Note: Bargain City had no fish or seafood. Only meat products were ground beef and lamb and goat shank.

Table 3. Retail prices for Selected Condiments and Spices from Supermarkets in Antigua, September 2-6, 2002. Prices in US \$.

Commodity	Supermarket	Brand name	Country of Origin	Total Price	Unit	Size	Ave. Price per ml
Casareep	Epicurean	Majors	Guyanese	out of stock			
	Food City	Sari	Guyanese	1.49	ml	300	0.005
	Bargain Center	Majors	Guyanese	1.39	ml	284	0.005
Cake coloring	Epicurean	Majors	Guyanese	1.59	oz	10	0.005
Green seasoning	Epicurean	Sari	Guyanese	3.86	oz	26	0.005
		Chief	Trinidad	1.47	oz	11	0.005
	Food City	Sari	Guyanese	1.28	ml	300	0.004
		Mabels		1.28	ml	300	0.004
		Denise	Antigua	2.13	oz	5	0.014
	Bargain Center	Sari	Guyanese	1.47	ml	300	0.005
		Chief	Trinidad	1.47	ml	300	0.005
Hot sauce	Epicurean	Crystal					
		Best					
		Louisiana	Canada				
		Susies	Antigua	2.40	oz	5	0.016
		Judies	Antigua	2.30	oz	5	0.016
		Tropical	Costa Rica	2.89	oz	5	0.020
		Denises	Antigua	2.41	oz	5	0.016
	Food City	Susies	Antigua	2.41	oz	5	0.016
	Bargain Center	Judy's	Antigua	2.31	oz	5	0.016
		Chief	Trinidad	0.89	oz	5	0.006

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